Vote on Enabling Symphony to Retain Patron Checkout History

Background: At the time the Montana Shared Catalog began using the "Unicorn" integrated library system (2002), the software and its associated iBistro online catalog had one, global option for retention and display of patron checkout history: On or Off for everybody and everything. The membership at that time, for various reasons, voted to turn off retention of patron history.

Currently: Unicorn is now called "Symphony" and with several enhancements to the system beginning with version 3.2 and subsequent "service packs", the option to retain and display patron checkout history has evolved so that if "tracking charge history" is enabled in system configuration:

- Each library has the option to allow or not allow retention and display.

- If enabled for the library, staff have the option to keep "tracking charge history" disabled on all user records or allow checkout history if the patron specifically requests it.

- Enterprise allows patrons to opt in or out of retention and viewing checkout history in their preference settings in "My Account". When turned on, the history displays in the Checkout tab of "My Account" in Enterprise. The user can, for example, turn it on temporarily to view history then turn it off again within the same, logged in session.

Why Are We Voting Now: A member library petitioned the MSC Executive Board to allow system retention of patron checkout history now that the system has a library by library, patron by patron and, patron self-service option to turn it on or off. After discussion during the board's annual retreat last July, they decided to bring the question to a vote by the membership at this meeting.

Possible Drawbacks:
- When the system configuration for "retain patron checkout history" is turned on, it will be enabled for all libraries and all patrons by default. MSC Staff will need to modify each Symphony library profile to turn it off and, thru the use of API, MSC support staff will need to set all patron user records to NOT retain checkout history. At that point, libraries that wish to enable retention will need to contact MSC support to turn it on for their library.
- If enabled by the library, library staff can view checkout history if the patron has opted in and if the properties are set to view charge history in the various wizards.
- If enabled by the library, each new user registration will have the charge history option turned on by default. Staff will need to manually turn off charge history for the new registration unless the patron requests that it be left on.
- For those libraries that are using online patron registration; when a new user applies for a library card using the online registration form, the newly created temp user record will have "track charge history" enabled. MSC support staff can setup a nightly report that will change the setting to "do not track" for these records. The patron can then opt in or out when they come into the library to pick up their permanent library card.

Functionality:
- SirsiDynix must be contacted to enable tracking of charge history in Symphony.
- A new database table is created and linked to the patron, item and charge record tables.
- Charge history will only be available commencing with the date enabled by SirsiDynix.
- Enterprise search profiles for each library will need to have "My Account" configurations updated to (1) allow retention of charge history and (2) to show charge history.

- Circ rules need to be modified to allow charge history.
- The Symphony Charge History Rule options (in the Modify User wizard) determine whether a given user can use the Enterprise My Account settings to actually control whether charge history is recorded.
- Detailed FAQ about tracking charge history can be found in Symphony Help here: http://mtscprod.msl.mt.gov/Helps/Symphony/Workflows/English/Content/workflows/07-Circulation/FAQs/FAQs_Using_Charge_Histor.htm#circ_3606612591_2241989

Clearing charge history:

- We can remove charge history information by periodically running the Purge Charge History report. With this report, we can remove charge history for all patrons and/or items, or only for selected patrons and/or items. Charge history will continue to be part of the patron records and item records until it is removed with the Purge Charge History report.

- If a patron is removed from the system using the Remove User wizard, all information – including charge history information – is removed.

- If an item is removed from the system using the Delete Title, Call Numbers or Items wizard, all information – including charge history information – is removed.

- Once a patron's or item's charge history has been removed with the Purge Charge History report, remove user or delete item, the information is not retrievable.

VOTE: Should SirsiDynix be contacted to enable tracking of charge history in our Symphony integrated library system? Note that your library must be represented at the MSC Fall Members Meeting to vote either in person or, online and able to participate in the discussion via chat or phone.